Facilities Information Management System (FIMS)

Training Workbook

March 2016
Version 2.28

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Exercise 1: FIMS Basics and Data Entry Concepts

1. **What is the URL to access the FIMS system?**

2. **Within the FIMS database structure, which of the following is the highest level?**

    a. Site
    b. HQ Program Office
    c. Field Office
    d. Area

3. **How frequently do you have to change your FIMS password?**

    a. 90 Days
    b. 60 Days
    c. 30 Days
    d. Never Expires

4. **The FIMS year-end snapshot is used for:**

    a. Federal Real Property Profile (FRPP) Reporting
    b. OMB Max Personnel Reporting
    c. DOE official record of real property by fiscal year
    d. All of the above

5. **How are required data fields in FIMS distinguished from those that are optional?**

6. **True or False**: A site will only have one area?

7. **True or False**: New sites can only be established by the HQ FIMS Administrators?

8. **True or False**: You should close your browser without clicking on the Logout button when terminating your FIMS session.

9. **Who should I contact if my FIMS account is suspended?**

   a. Field Office System Administrator
   b. Headquarters FIMS Support
   c. HQ Program Office
   d. Adam Pugh

10. **What window in FIMS provides informational messages from the HQ FIMS System Administrators?**

11. **When entering currency fields in FIMS, do I need to input the dollar sign ($) and commas (,)?**

12. **How is the Site Level Operating Cost populated?**

    a. FIMS Allocation
    b. HQ Program Office
    c. Adam Pugh
    d. Site Data Entry

Exercise 2: Adding a New Building Record

Please remember that your data is being validated and you may receive data validation messages.

1. Click on **Property** and select **Property List.**

2. While at the Property List window, click on the **Create New Building** command button.

3. From the New Building window, type in the following data to establish the new record in the database. The fields in the table below are what is considered forced required fields. This means an asset cannot be established in the FIMS database without these data elements.

Property Information			
Property ID	[make up your own]	**Initial Acquisition**	$2,345,900
Property Name	Comp Lab 3	**Status**	Operating
Alternate Name	CL III	**HQ Program Ofc**	Office of Management
Usage	702 Computation Lab 3	**Asset Type**	501 Buildings
Ownership	DOE Owned	**Reporting Source**	CH9 Chicago Ops Ofc
Building Detail			
Gross Sqft	15,500	**Year Built**	2000
Year Acquired	2011	**RPV**	$3,150,000

4. Once the record has been established in the database, continue to populate the data fields in the table below.

Property Information			
Hazard Category 1	12 Not Applicable	**Historic Designation**	Not Evaluated
Property Detail			
Status Date	02/05/2015	**Using Organization**	Department of Energy
Location			
Location State	NV	**Location Zip Code**	89701-1224
Location City	Carson City	**Location Cong District**	2
Location County	Carson City	**Main Location**	2000 E 95th Street
Building Info			
Land Ownership	Owned by DOE		
Total No of Fed Empl	35	**Total No of Contractor Empl**	10
Total No of Other Pers	0	**Total No of Occupants**	45
Dimensions			
Usable Sqft	14,000	**Goal Subject Facilities**	15,500
No of Floors	3	**Excluded Facilities**	0

Meters: Electricity	Metered-Standard	Non-EC Facilities	0
Meters: Gas – Natural	De Minimus Use		
Capital Adjustments			
Capitalized Indicator	Yes	Adjustment Cost	$55,000
Asset Type	501 Buildings	Description of Cap Adj	Roof Improvements
Adjustment Date	09/02/2015		
Mission			
Mission Unique Facility	Not Mission Unique		
Mission Dependency	Mission Critical	Mission Dep Program	NA10 Science Campaign
Core Capability - Primary	C06 Non-nuclear		
Maintenance			
Repair Needs	$14,500	Snow Removal Cost	$1250
Deferred Maintenance	$12,000	Gas Cost	$11,235
Inspection Date	08/31/2015	Refuse Cost	$2,300
Actual Maint Cost	$10,000	Recycle Cost	$1,740
Electricity Cost	$349,000	Janitorial Cost	$4,000
Water/Sewer Cost	$19,900	Grounds Cost	$2400
Central Heating Cost	$0	Pest Control Cost	$1225
Central Cooling Cost	$0	Hours of Operation	120
Cool Roof			
Total Roof Proj Area	5200	Planned CR Comp Date	2017
Utilization			
Asset % Utilized	97%		

5. What is the Asset Utilization Level for this building?

6. What are the components used by FIMS to calculate building RPV values?

7. What indicator would have to be set to allow me to enter Outgrant information if a portion of my building was being leased to a third party? Where can this indicator be found?

Exercise 3: Property Search

1.   Click on **Property** and then select **Property Search**.

2.   Select **Brookhaven National Laboratory**.

3.   Using the Fuzzy Search capability, search for assets that contain **Lab** in the Property Name field. How many assets did you retrieve?

4.   Review a record with a Real Property Unique identifier of **124265**. What is the current utilization percentage of this asset?

Exercise 4: FIMS Data Element Review

1. **When entering the Usage Code on the Property Info window, what should this entry reflect?**
    a. Design Use
    b. Current Use
    c. Future Use
    d. None of the above

2. **Occupancy data within FIMS is required for which of the following?**

    a. Office and Laboratory assets
    b. All usage codes
    c. Assets with a Status of 'Operating'
    d. All of the above

3. **The Inspection Date from the Maintenance window will be populated when the following occurs.**
    a. Actual maintenance was performed to repair a building component
    b. Site Manager conducts a formal review of the asset
    c. Last deficiency based Condition Assessment Survey
    d. Annual utilization survey

4. **What could be the source of the Asset % Utilized?**
    a. Annual visit with building Facility Manager
    b. Annual utilization survey
    c. Space Management System
    d. Utilization Report from the Site Manager
    e. All of the above

5. **When does the Determination Date for DOE Disposal get populated?**
    a. When the Site makes the determination the asset is no longer needed
    b. Sometime after the completion of the Headquarters excess screening process
    c. Prior to the Headquarters excess screening process
    d. Prior to archiving the asset in FIMS

6. **When does the GSA – Notification Submitted get populated in FIMS?**
    a. When DOE has submitted a Report of Excess (ROE) to GSA
    b. When DOE has received acceptance of the Report of Excess (ROE) from the GSA disposal office.
    c. When the Headquarters excess screening process is completed
    d. When Can't Currently Be Disposed is populated
    e. None of the above

7. **You have an office building that is 100% utilized and consumes electricity. There is no way to determine how much electricity the building is consuming. What option would you select for the Meters – Electricity data element?**
    a. Metered – Standard
    b. Not Used
    c. Not Metered
    d. None of the above

8. **It is acceptable for Actual Maintenance to be based on an allocated amount as long as the value is derived from a maintenance management system? TRUE or FALSE**

9. **Which types of personnel should be counted in the Total No of Other Personnel?**
    a. Interns
    b. Volunteers
    c. Temporary Workers (Not Federal or Contractor personnel)
    d. All of the above

10. **When performing an archive in FIMS, what date should the Disposition Date reflect?**
    a. The actual date of the asset disposition
    b. The date the FIMS administrator was informed the asset had been disposed of
    c. The date provided by the Headquarters Program Office
    d. None of the above

Exercise 5: Archiving a Building Record

1. Go to the building record you added as part of Exercise 2.

2. In this scenario, the building has been sold as part of a public sale. This building was sold on March 1, 2016. What two fields would you populate on the Disposition – Archive window to reflect this?

3. The Actual Sales Price is $250,000. The cost associated with the disposal of this asset is $18,000. What would the Net Proceeds be for this disposition?

4. Make the appropriate entries in FIMS and perform the archive. Did you receive a confirmation message before the archive was final?

5. Now that the asset is archived, can this building be accessed through the Property List window?

Exercise 6: AAIM Asset Module

Adding a new Anticipated Asset for the expansion of an existing asset

1. Click **AAIM** then **AAIM New Asset** from the FIMS menu.

2. Accept the default Program Office, Field Office, Site and Area.

3. Click **Existing Asset** from the Category field picklist.

4. Select the Property ID of the existing asset that is being expanded from the **Select Property ID** list.

5. The Real Property Unique ID for the existing asset will be displayed in the **Existing Asset** field. The following fields will be populated with values from the existing asset.

Property Type	**Property ID**
Ownership	**Property Name**
Usage Code	**State**
City	**County**
Zip Code	**Congressional District**
Main Location	

6. Input values for:
    a. **Project Number** (The number used by PARS II or the site office if PARS II is not used)
    b. **Beneficial Occupancy Year** (The year the site anticipates taking beneficial occupancy)
    c. **Initial Acquisition Cost/ Annual Rent** (Estimated final acquisition cost or annual first year rent)
    d. **Gross/ Rentable Sqft** (Gross Sqft from the most mature planning document)
    e. **Usable Sqft** (Gross Sqft less common areas)

    NOTE: See Appendix H AAIM Data Element Dictionary of the FIMS User's Guide for complete definition for the AAIM fields.

7. Change the **Usage Code** if the expansion of the existing asset will change the predominant usage of the building/trailer based on square footage.

8. Click the ⊞ Save button to add the record.

9. Note the AAIM Unique ID for the record you created. _____
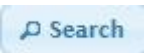

Exercise 7: Transfer an AAIM asset to FIMS

Transfer the AAIM asset created in the previous exercise to FIMS

1. Click **AAIM**, then **AAIM Asset List** from the FIMS menu.

2. Locate the AAIM asset created in the exercise above. Click the <u>Property ID</u> of the AAIM asset to open the AAIM Asset window.

3. Click the <u>Transfer Asset</u> button. Click **Yes** to the <u>Transfer AAIM asset to FIMS</u> message.

4. The <u>Category</u> field of the AAIM asset was *Existing Asset*. The AAIM data will be merged with the corresponding existing FIMS asset. The Property Info window will open for the existing FIMS asset. All related information should be reviewed and updated, such as RPV and Energy Consuming square feet. The AAIM asset will be archived to the AAIM archive.

Exercise 8: Generate a report of the AAIM anticipated assets

Create a report of all the AAIM assets

1. Click **AAIM**, then **AAIM Asset List** from the FIMS menu.

2. Select **All** from the Field Office picklist. Ensure the Site and Area picklist values are also **All**.

3. Click the <u>Search</u> button.

4. Click the <u>Run Report</u> button. Click **Open** to view the report in Microsoft Excel. The report displays all the data collected for the anticipated assets.

Exercise 9: Locate and Generate a FIMS OSF Standard Report

Owned OSF Complete Information Report

1. Click **Reports** then **Standard** from the FIMS menu.

2. Locate the FIMS Standard Reports that are applicable to OSF assets by using the OSF filter column.

3. Click on report **#040 Owned OSF Complete Information Report**.

4. Click the **Program Office** picklist. View the available choices. Ensure **All** is selected.

5. Select your Field Office, Site, and Area from the criteria picklist.

6. Select several properties from the **Property ID** picklist by clicking the first Property ID and then use **Ctrl**+**Click** to select the additional Property IDs.

   The Property ID picklist allows the selection of 'All', one, or multiple Property IDs. You may also use **Click** and then **Shift**+**Click** to select a series of adjacent Property IDs.

7. Click the **PDF Report** button to preview your report. The Owned OSF Complete Information report displays one FIMS OSF record per page grouped by data categories.

8. Use the back button on the browser to go back to the report generation window. Select a few Property IDs and run the report to the **Excel** format.

9. Click **Save As** and save the file to the Desktop. Note the file name: ExcelReport.xls. Change the File Name: to **Rpt040.xls**. Click the **Save** button.

10. Open the Rpt040.xls file in Microsoft Excel.

    Notice that there is one line for each OSF asset in the Excel format. The Complete Information reports contain 98% of all the data fields tracked for an asset in FIMS. Once in the Excel format this report can be edited to remove columns, filtered to limit the data viewed or customized in many ways to create a user specific report.

    If you want to check the Meters data fields for your Owned OSF records prior to your FIMS Site Validation, you could use the Excel format of this report to verify that your data is correct.

    Complete Information reports exist for each Property Type (building, OSF, land and trailer).

Exercise 10: Locate the FIMS Standard Reports used for the Data Validation process

Data Validation Reports

1. Access the FIMS Standard Reports.

2. Use the <u>Category</u> column picklist to find the **Data Validation** reports.

    The 6 available FIMS Standard Reports will be displayed on the Report List window. These are the reports used to extract the FIMS Data Validation forms/data.

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Exercise 11: Viewing Archive Data

Viewing Archived assets in FIMS

Once an asset has been disposed of and archived in FIMS, the asset is no longer available for update through the FIMS data entry windows. The FIMS Standard Reports provide a means of viewing the building, trailer, OSF and land assets that have been archived.

1. Access the FIMS Standard Reports.

2. Use the <u>Category</u> column picklist to find the **Archive** reports.

3. Click on report **#079 Archived Building/Trailer Report**.

4. Select your Program Office, Field Office, Site, and Area, a Property Type and then a specific Property ID. If you can't find any archived assets under your site, choose another Field Office, Site and Area.

    The **Shift**+**Click** feature can be used to select a group of adjacent values and the **Ctrl**+**Click** feature can be used to select non-adjacent values for any selection criteria displayed in the listboxes. (Area and Property ID).

5. Generate the report to PDF format.

    View the displayed report. Locate the <u>Date Archived</u> (hint: look in the Property block). This is a FIMS system generated data field that is automatically populated with the date the record was archived (moved from the active FIMS tables to the Archive tables).   Notice the <u>Date</u> and the <u>Method</u> in the Disposal Information block. This date is the Disposition Date. It may or may not be the same as the Date Archived. Method is the Disposition Method of the asset.

6. To view the Notes for an Archived assets you will need to generate report #083 DOE Archive Notes Detail Report.

    a. Use the back button on the browser to return to FIMS. Repeat steps 1 and 2 to locate the Archive reports again.

    b. Click on report **#083 DOE Archive Notes Detail Report**.

    c. Select your Program Office, Field Office, Site, and Area and then a specific Property ID. If you can't find any archived assets under your site, choose another Field Office, Site and Area.

    d. Generate the report to the PDF format.

7. Use the back button on the browser to return to FIMS.

Ad Hoc Reporting Tools

Creating an Ad Hoc – Current Report:

1. Be default upon entering the Ad Hoc tool, **Current Data** is selected on the left hand side of the window.   Current Data provides access to the current active FIMS data.

2. Choose selection criteria using the listboxes and check boxes for the following FIMS data fields:
   > Program Office (Asset level)
   > Field Office
   > Site
   > Property Type
   > Ownership
   > Status

   a. Use one of the following methods to select criteria from the listboxes and/or check boxes.

      1. Select a single value by clicking on the value in the list.

      2. Select multiple adjacent values by clicking the first value in the list and then **Shift**+**Click** the last item in the list you desire to select. This will result in a group of values being highlighted.

      3. Select multiple nonadjacent values by clicking the first value and then **Ctrl**+**Click** individual values to select additional values from the list. This will result in multiple values being highlighted.

      4. Select all criteria options available in the list by clicking the value '**All'** at the beginning of the list.

      5. Click the individual check boxes to toggle them as selected or not selected.

3. Select the data to be displayed on the report.

   a. Select columns from the 'Available Display Columns' listbox and move them to the 'Selected Display Columns' listbox by using one of the following methods.

      1. Click a single column and click the [→] button.

      2. Double-click a column in the 'Available Display Columns' list to move it to the 'Selected Display Columns' list.

      3. Drag and drop a column by clicking it in the "Available Display Columns' list and while holding the left mouse button drag it to the 'Selected Display Columns' list and release the mouse button.

      4. To select multiple columns, click the first column then ctrl+click the remaining columns to select all desired columns in the 'Available Display Columns' list. Use

the navigational arrow ⟶ to move the group of columns to the 'Selected Display Columns' list.

5. Use the ⇥ button to move all columns from the 'Available Display Columns' to the 'Selected Display Columns' list.

6. Use the ⇤ button to move all columns from the 'Selected Display Columns' list to the 'Available Display Columns.

7. Select column(s) from the 'Selected Display Columns' list and click ← button to move them back to the 'Available Display Columns' list.

b. Columns will appear in the Excel report in the same order as they are in the 'Selected Display Columns' list.

1. The columns in the 'Selected Display Columns' list may be reordered using the navigational arrows, ↑ Move Up, ⤒ Move Top, ↓ Move Down, and ⤓ Move Bottom, to the right of the list. Click a column to select it and use the navigational arrows.

4. To generate the report, click on the **Run Report** button. Large reports may take a few extra seconds to display. You will receive a prompt with the options to **Open** the report or **Save** the report. You must save the Excel file to capture the report.

Exercise 12: FIMS Ad Hoc Reporting Tool

Ad Hoc – For your upcoming FY2016 FIMS Data Validation determine the FIMS records that will be validated. View the DOE Owned Buildings, Trailers and OSF; the DOE Leased Buildings, Trailers and OSF and GSA Occupancy Agreements; and the DOE Owned, DOE Leased and Withdrawn from Public Domain land records at your site(s).

1. To determine your sample size for your FIMS Data Validation, you will need to know the number of DOE Owned Buildings, Trailers and OSF at your site(s). The Ad Hoc tool provides an easy way to obtain the correct count if you don't know the exact count or you want to verify the count.

2. Click **Reports,** then select **Ad Hoc Report** from the FIMS menu.

3. Select Program Office = **All**, then select your Field Office and Site(s) from the appropriate listboxes.

4. From the Ownership listbox, click **DOE Owned (O).**

5. From the Property Types check boxes, click **Land** to deselect it. Only Buildings, Trailers and OSF will be included in this Ad Hoc report.

6. The Status picklist should have **All** selected. No additional columns are needed for the report.

7. Click the **Run Report** button. Click **Open** to view your data.

8. Scroll to the bottom of the spreadsheet. How many DOE Owned Buildings, Trailers and OSF assets are at your site(s)? _____ *Hint: Just use the line numbers in Excel. Don't forget to exclude the Header row and the total row. This list of assets represents the assets at your site that could be validated. Remember only a random sample of these assets will actually be extracted for the validation.*

9. Close the Excel file.

10. Back on the Ad Hoc Report – Current window, change the Ownership listbox to **DOE Leased (D).** Then select **GSA Owned (G)** and **GSA Leased (L)** by holding the Ctrl key on the keyboard and then Click each.

11. Click the **Run Report** button. Click **Open** to view your data. How many DOE Leased Buildings, Trailers and OSF and GSA Occupancy Agreement assets are at your site(s)? _____ *All DOE leased and GSA Occupancy Agreement assets will be included in your site's data validation for FY2016.*

12. Close the Excel file.

13. Back on the Ad Hoc Report – Current window, change the Ownership listbox by clicking **DOE Leased (D)**, then ctrl+click **DOE Owned (O)** and ctrl+click **Withdrawn Land (W).** All 3 values should be selected.

14. Change the Property Type check boxes to deselect Buildings, Trailer and OSF and to select Land.

15. Click the **Run Report** button. Click **Open** to view your data. How many land records will be validated? _____ Close the Excel file.

16. *For FY2016 Data Validations, all DOE Owned (O), Withdrawn Land (W) and DOE Leased (D) land will be included in the validation data set up to a maximum of 25 records. If more than 25 land records exist for your site, a random pull of 25 land records will be validated.*

Exercise 13: FIMS Ad Hoc Reporting Tool

Condition Index (CI) – CI is the measure of a real property asset's condition as defined by the Federal Real Property Council. CI reflects the asset's current physical condition. The index is one less than the ratio of repair needs to replacement plant value then multiplied by 100.

Ad Hoc – Generate a report of Condition Index

1. Click **Reports** and then select **Ad Hoc Report** from the FIMS menu.

2. Select your Program Office (or All), Field Office and Site from the appropriate listboxes.

3. From the Ownership listbox, click **DOE Owned (O)**.

4. From the Status listbox, select Operating facilities. Click **Operating**. Then scroll to Operational Standby and then Shift+Click **Operational Standby**. This will select Operating, Operating Pending D&D, Operating Under an Outgrant, and Operational Standby.

5. From the Property Types check boxes, click **Land** to deselect it. Only buildings, trailers and OSF will be included in the Ad Hoc report.

6. Scroll through the list of 'Available Display Columns' and in addition to the preselected columns select the following columns. The list of 'Available Display Columns' is listed in alphabetical order. Remember the order of the 'Selected Display Columns' will determine the sort order of the Ad Hoc report.
   a. Double-click **Annual Actual Maintenance**
   b. Double-click **Repair Needs**
   c. Double-click **Deferred Maintenance**
   d. Double-click **Gross/Rentable Sqft**
   e. Double-click **RPV**
   f. Double-click **Property Type**
   g. Double-click **Condition Index**

7. Move **Property Type** so that it will sort after **Site Name**.

8. Click the **Run Report** button. Click **Save As** and save the file to the Desktop. Change the File name: to: **FIMS CI.xls**

9. Open the Excel file **FIMS CI.xls**.

10. In Excel add subtotals: To begin, let's remove the existing 'Totals' row at the bottom of the spreadsheet because it will be recreated.
    a. Press **Ctrl + the down arrow** on the keyboard to scroll to the bottom of the spreadsheet.

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b. Click the 'Totals' row to select it.
c. Click the right button on the mouse and click **Delete**.
d. Press **Ctrl** + **Home** on the keyboard to scroll to the top of the spreadsheet.
e. Click the **Data** tab (at the top of the screen), then click **Subtotal** from the Outline group.
f. From the Subtotals dialog box ensure each of the following are chosen:
    1. "At each change in" - **Property Type**
    2. "Use function" – **Sum**
    3. "Add subtotal to" – **Annual Actual Maintenance, Repair Needs, Deferred Maintenance, Gross/Rentable Sqft,** and **RPV** (use the scroll bars and ensure each column has a check mark)
    4. Ensure "Replace current subtotals" and "Summary below data" are checked
    5. Click **OK**
    6. Scroll through the spreadsheet and notice the subtotals by Property Type.

11. When you add subtotals to a spreadsheet, Excel outlines the data. Note the outline symbols in the upper left-hand corner of the spreadsheet and on the left-hand side of the spreadsheet. You can create a summary report by clicking the outline symbols 1 2 3 , ✦, and ▬ to hide the details and show only the totals. Click the outline symbols to view the different detail and summary views.

12. Save the spreadsheet and close Excel.

Exercise 14: FIMS Ad Hoc Reporting Tool

FIMS tracks DOE leased assets as well as contractor leased, contractor license, permit, GSA owned and GSA Leased. This report can be used to extract information for any of these asset Ownerships by simply changing the Ownership in the Ad Hoc report.

Ad Hoc – Extract DOE Leased buildings and trailers

1. Click **Reports** then select **Ad Hoc Report** from the FIMS menu.

2. Select **All** Program Offices, **All** Field Office and **All** Site(s) from the appropriate listboxes.

3. From the Property Types check boxes select only **Buildings** and **Trailer**.

4. From the Ownership listbox, select **DOE Leased**.

5. From the Status listbox, accept the default of **All**.

6. Scroll through the list of 'Available Display Columns' and in addition to the preselected column select the following columns. The list of 'Available Display Columns' is listed in alphabetical order. The order of the 'Selected Display Columns' will determine the sort order of the Ad Hoc report

Real Property Unique ID	**Main Location**
Alternate Name	**Location City**
Usage Code	**Location State**
Ownership	**Location Zip Code**
Gross/Rentable Sqft	**Location County**
Usable Sqft	**Location Congressional Dist**
Ingrant–Annual Rent	**Using Organization**
Ingrant–Expiration Date	**Total No of Occupants**
Ingrant - Lease Authority	

7. Click the **Run Report** button. Click **Save As** and save the file to the Desktop. Change the file name to: **FIMS DOE Leased Buildings and Trailers.xls**

8. Open the Excel file **FIMS DOE Leased Buildings and Trailers.xls** from your Desktop and view the data you retrieved. This extract represents all the DOE lease agreements for buildings and trailers. Close the Excel file to return to FIMS.

9. To save the Ad Hoc report, click the **Save Report** button. Ensure the <u>Create New Report</u> button is selected. In the <u>New Report Title</u> field, type **FIMS DOE Leased Buildings and Trailers**. Click **Save**.

FIMS Ad Hoc – Historical Data

The Ad Hoc – Historical data provides access to FIMS data from past fiscal years. Currently FY2007 through FY2015 data is available. This data is from the fiscal year end database snapshots that are taken during the headquarters year end processing. The snapshots are generally taken around the middle of November.

Selecting multiple fiscal years of historical data will cause multiple rows to be displayed on your report output for a single asset. For example, if you select RPV for all fiscal years for Property A, you will see Property A on nine lines, each line representing an RPV value for each of the fiscal years 2007 through 2015.

Exercise 15: FIMS Ad Hoc – Historical Reporting Tool

Ad Hoc–Historical – Create a report of FY2015 Operating Costs for the Buildings at your site.

1. Access the FIMS **Ad Hoc Report** tool.

2. Click the **Historical Data** selection on the left hand side of the window.

3. Ensure the Fiscal Year = **2015**.

4. Select your Program Office, Field Office and Site(s) from the appropriate listboxes.

5. In the Property Types listbox, ensure only **Buildings** is selected

6. From the Ownership listbox, click **DOE Owned (O)**.

7. Select the following data fields for your report.

    a. Status
    b. Annual Actual Maintenance
    c. 11 Operating Cost data fields (Hint: The Operating cost data columns are all prefixed with 'Op Costs'.)
    d. Op Costs – Total
    e. RPV
    f. Repair Needs

8. Move Status to the first column of the report. (Hint: Click and drag it to the top of the list of data fields or user the buttons to the right side of the list of data fields.)

9. Click the **Run Report** button. Click **Save As** and save the file to the Desktop. Change the file name: **FIMS FY2015 Operating Costs.xls**

10. Open the Excel file **FIMS FY2015 Operating Costs.xls** to view your report and make any needed formatting changes using Print Preview and Setup.

    Notice that Totals are provided at the bottom of the spreadsheet for numeric columns.

11. In Excel create subtotals by Status for each of the numeric data fields on this report. Start by removing the 'Totals' row because it will be recalculated.

    a. Press **Ctrl + the down arrow** on the keyboard to scroll to the bottom of the spreadsheet.
    b. Click the 'Totals' row to select it.
    c. Click the right button on the mouse and click **Delete**.
    d. Press **Ctrl + Home** on the keyboard to scroll to the top of the spreadsheet.

e. Click the **Data** tab (at the top of the screen), then click **Subtotal** from the Outline group.

f. From the Subtotals dialog box ensure each of the following are chosen:
1. "At each change in" - **Status**
2. "Use function" – **Sum**
3. "Add subtotal to" all the numeric data fields (Use the scroll bars and ensure each column has a check mark)
4. Ensure "Replace current subtotals" and "Summary below data" are checked
5. Click **OK**
6. Scroll through the spreadsheet and notice the subtotals by Status.

12. **Save** the spreadsheet and close Excel.

13. Save the Ad Hoc report by clicking the **Save Report** button. Ensure the Create New Report button is selected. In the New Report Title field, type **FY15 Operating Costs for Buildings**. Click **Save**.

FIMS Ad Hoc – FRPP Data

The Ad Hoc – FRPP Data provides access to FIMS fiscal year end data reported to the Federal Real Property Profile (FRPP). Currently data is available for FY2012 through FY2015. The 'Available Display Columns' represents the FRPP data fields. The data values represent the required data formats and codes for FRPP reporting.

Property Type choices consist of Building, OSF and Land. FIMS buildings and trailers are reported to the FRPP as Buildings. Only FIMS DOE Owned and DOE leased assets as well as Withdrawn from Public Domain land are reported to the FRPP.

Assets reported to the FRPP as disposed (removed from DOE's inventory of real property) can also be extracted from the Ad Hoc – FRPP Data tool. Use the Status criteria picklist to select Disposed assets. Please be aware when you are searching the non-disposed assets that you should de-select the Status of Disposed from your selection criteria.

The Ad Hoc - FRPP Data tool has a search capability to allow a record to be located by the Real Property Unique Id. Click the **Unique ID Search** button at the bottom of the screen. You will be prompted to input a Real Property Unique ID and then select the FRPP data fields to be extracted.

Exercise 16: FIMS Ad Hoc – FRPP Reporting Tool

Ad Hoc–FRPP Tool – Extract the Legal Interest and Operating Cost reported in FY2015 to the Federal Real Property Profile for the assets at your site.

1. Click **Reports** and then select **Ad Hoc Report** from the FIMS menu.

2. Click the **FRPP Data** selection on the left hand side of the window.

3. Ensure the Fiscal Year = **2015**.

4. Select your Program Office, Field Office and Site(s) from the appropriate listboxes.

5. Include **Buildings, OSF** and **Land** in your report.

6. Include all Ownerships in your report.

7. Exclude **Disposed** assets from your report. (Hint: User the Status listbox.)

8. In addition to the preselected columns select the following columns. The list of 'Available Display Columns' is listed in alphabetical order. The order of the 'Selected Display Columns' will determine the sort order of the Ad Hoc report

Real Property Type	**Lease Annual Rent**
Legal Interest	**Lease O&M Cost**
O&M Cost	

9. Click the **Run Report** button. Click **Save As** and save the file to the Desktop. Change file name: **FY2015 FRPP Operating Costs.xls**

10. Open the Excel file **FY2015 FRPP Operating Costs.xls** to view your report and make any needed formatting changes using Print Preview and Setup.

    Notice that Totals are provided at the bottom of the spreadsheet for numeric columns.
    - Legal Interest defines Ownership.
        - DOE leased asset operating cost is reflected in the Lease Annual Rent and Lease O&M Cost data fields.
        - DOE Owned assets and Withdrawn from Public Domain land asset operating cost is reflected in the O&M Cost data field.

11. **Save** the spreadsheet and close Excel.

12. Save your Ad Hoc report criteria. (Hint: Use the **Save Report** button.).

13. To rerun this report for FY2014 values, just change the Fiscal Year to 2014 and click **Run Report**.

Exercise 17: FIMS Ad Hoc – FRPP Reporting Tool

Ad Hoc–FRPP Tool – Extract FRPP reported data using the Unique ID Search.

1. Click **Reports** and then select **Ad Hoc Report** from the FIMS menu.

2. Click the **FRPP Data** selection on the left hand side of the window.

3. Click the **Unique ID Search** button at the bottom of the window.

4. Type **210270** into the Real Property Unique ID search box.

5. Select columns from the 'Available Display Columns' listbox that you want to extract for your report and move them to the 'Selected Display Columns' listbox. Or click the 'Add All' arrow button to select all the columns.

6. Click the **Run Report** button. Click **Save As** and save the file to the Desktop. Change file name: **Real Property Unique ID 210270.xls**

7. Open the Excel file **Real Property Unique ID 210270.xls** to view your report. How many records did you retrieve? _____

    Why? _____

FIMS Population Queries

FIMS Population Queries

The FIMS Population queries are accessible within the FIMS application from the FIMS menu item <u>Reports</u>, then <u>Population.</u> Use the available listboxes to choose your selection criteria and then click the **FIMS Population** button to run the queries.

The reports are generated in an Excel spreadsheet format with multiple sheets.

The first sheet, "Summary", reflects a summary of the remaining sheets by specific FIMS data fields. The "100% Populated" column of the first sheet identifies 'YES' if the data fields are fully populated or 'NO' if there is missing data for specific data fields. See sample below.

The remaining sheets in the spreadsheet provide corresponding detail reports. If the "100% Populated" column in the "Summary" sheet identifies 'NO', use the "Report Name" column in the Summary sheet to identify a specific detail sheet, i.e. Report Name = Pop01, look for sheet Pop01.

The detail sheet will identify the FIMS records by Property ID and the data fields that are missing data. Reference the detail sheet sample on the following page and look for blank cells under "Roads – Public Access Miles", "Roads – Public Access Lane Miles", "Roads – Non-Public Access Miles" and "Roads – Non-Public Access Lane Miles".

Detail sheets that have no data and display a message 'No data was found for this report.' indicate that the data fields are 100% populated. The Summary sheet "100% Populated" column should reflect 'YES'.

Sample "Summary" Sheet of the FIMS Population Report

FIMS Population Report Summary

Report Name	Report Summary	100% Populated
Pop01	01 POP - B/T/S/L Status, Using Org, Ownership, Outgrant Ind, Mission Dependency	YES
Pop02	02 POP - B/T/S/L Asset Type, Reporting Source, Initial Acquisition, Capitalized Ind, Estimate Ind, Hist Designation	YES
Pop03	03 POP - B/T/S/L Status Date	YES
Pop04	04 POP - Building Usable Sqft, No. of Floors, Year Acquired, Year Built	YES
Pop05	05 POP - Bldg Land Ownership	YES
Pop06	06 POP - Bldg/Trl Def Sys 1	YES
Pop07	07 POP - Bldg/Trl Goal Subject Fac, Excluded Fac, Meters, Sustain Site Number, Model, Util, Total Occ, Site Factor	YES
Pop08	08 POP - Bldg/Trl Exclusion Part, Justification Comment, Excluded Facilities	YES
Pop09	09 POP - Bldg/Trl/OSF Inspection Date	YES
Pop10	10 POP - Bldg/Trl/OSF Hazard Cat	YES
Pop11	11 POP - Bldg/OSF Convention Fac Ind (SC sites only)	YES
Pop12	12 POP - Trl Year Acquired, Year Built	YES
Pop13	13 POP - OSF Public-Non Public Roads	YES
Pop14	14 POP - OSF Safety Inspection Date Bridge	YES
Pop15	15 POP - OSF Land Ownership	YES
Pop16	16 POP - OSF Year Acquired, Def Sys 1	YES
Pop17	17 POP - OSF Goal Subject Fac, Excluded Fac, Meter, Sustain Site Numbers	YES
Pop18	18 POP - Land Year Acq	YES
Pop19	19 POP - Land Acreage	YES
Pop20	20 POP - Capital Adjustments	YES
Pop21	21 POP - Outgrants	YES
Pop22	22 POP - B/T/S/L Ingrant	YES
Pop23	23 POP - Bldg/Trl Cool Roof	YES
Pop24	24 POP - Anticipated Disposition Method	YES

Note: To view detailed report information, click on the Excel sheets at the bottom.

Sample "Pop12" Detail Sheet of the FIMS Population Report

Site Number - Name	Area Number	Secretarial Office	HQ Program Office	Property ID	Real Property Unique ID	Roads – Public Access Miles	Roads – Public Access Lane Miles	Roads – Non-Public Access Miles	Roads – Non-Public Access Lane Miles	Usage Code
19001 - Office o 012	NNSA	NNSA		STC-OSF-ROAD	210024					1739
19001 - Office o 012	NNSA	NNSA		TF-OSF-ROADTERT	210022					1749

Blank cells represent missing data.

FRPC Population Queries

The FRPC population queries can be accessed from the FIMS menu item <u>Reports</u>, then <u>Population.</u>

Use the available listboxes to choose your selection criteria and then click the **FRPC Population** button to run the queries.

The reports are generated in an Excel spreadsheet format with multiple sheets just like the FIMS Population queries.

The first sheet, "Summary", reflects a summary of the remaining sheets by specific FIMS data fields. The "100% Populated" column of the first sheet identifies 'YES' if the data fields are fully populated or 'NO' if there is missing data for specific data fields. See sample below.

The remaining sheets in the spreadsheet provide corresponding detail reports. If the "100% Populated" column in the "Summary" sheet identifies 'NO', use the "Report Name" column in the Summary sheet to identify a specific detail sheet, i.e. Report Name = FRPCPop14, look for sheet FRPCPop14 to determine missing Deferred Maintenance values.

The detail sheet will identify the FIMS records by Property ID and the data fields that are missing data.

Detail sheets that have no data and display a message 'No data was found for this report.' indicate that the data fields are 100% populated. The Summary sheet "100% Populated" column should reflect 'YES'.

Sample Summary Sheet of the FRPC Population Report

FRPC Population Report Summary

Report Name	Report Summary	100% Populated
FRPCPop01	01 FRPC - Historic Designation	YES
FRPCPop02	02 FRPC - Status, Using Org, Outgrant Ind	YES
FRPCPop03	03 FRPC - Building/Trailer GSFT	YES
FRPCPop04	04 FRPC - Repair Needs, RPV	NO
FRPCPop05	05 FRPC - Land Acreage	YES
FRPCPop06	06 FRPC - Site Operating Cost	YES
FRPCPop07	07 FRPC - Location, Congressional District	YES
FRPCPop08	08 FRPC - Hours of Operation	YES
FRPCPop09	09 FRPC - Annual Rent, Lease Auth, Lease Expiration Date	YES
FRPCPop10	10 FRPC - Building/Trailer Asset % Utilized	YES
FRPCPop11_FY14	11 FRPC - Archive Disposition Value	YES
FRPCPop12	12 FRPC - Def Maint	NO
FRPCPop13	13 FRPC - Actual Maintenance	YES

Note: To view detailed report information, click on the Excel sheets at the bottom.

Exercise 18: Using the FIMS Population Queries tool

FIMS Population Queries – Generate the report for your site

1. Click **Reports,** then select **Population** from the FIMS menu.

2. Select your Field Office and Site from the appropriate listboxes.

3. Click the **FIMS Population** button. Click **Save As**, and save the file to the Desktop. Note the file name: **FIMS Population Report.xls**

4. Open the Excel file **FIMS Population Report.xls** and view the **Summary** page.

   a. Locate the Meters reports (Note: There are 2 reports one for Bldg/Trl and one for OSF. Look for reports Pop07 and Pop17.) and determine if your site's data is 100% populated.

5. Close the Excel file.

Exercise 19: Create a FIMS Upload Template

Use FIMS to create a template to upload Occupant data

1. While logged into FIMS, click **Property** then select **Upload** from the FIMS menu.
.
2. From the Select Template picklist, select **General**.

3. The 'Available Columns' are listed in alphabetical order. Scroll and select the following columns.

   a.   Double-click **Total No of Contractor Employees**
   b.   Double-click **Total No of Federal Employees**
   c.   Double-click **Total No of Other Personnel**
   d.   Double-click **Total No of Occupants**

4. Click the **Generate Template** button. Click **Save As** and save the template to your Desktop. Change the File name to **Occupant_upload.xls**. Click the **Save** button. Click the **Open** button to open the template file.

   a. Notice that the Site Number, Area Number and Property ID data fields have been added to the template. These are the FIMS data fields that will uniquely identify a record within the database.

5. Minimize this window for now.

_____

Exercise 20: Extract Data from FIMS for the Upload Process

Use the Ad Hoc query tool to extract data from FIMS to be updated by your Site Subject Matter Expert for the upload process

1. Click **Reports,** then select **Ad Hoc Report** from the FIMS menu.

2. Select Program Office = **All**, your Field Office and Site from the appropriate listboxes.

3. From the Ownership listbox, click **Contractor Leased (C)**, **DOE Leased (L)**, and **DOE Owned (O)**. Remember to use Ctrl+click to select the 3 items.

4. Verify that you have all Status values selected.

5. From the Property Types check boxes, click **Land** and **OSF** to deselect them. Occupancy data is only collected in FIMS for buildings and trailers.

6. From the "Selected Display Columns" listbox remove **columns Program Office** and **Site Name** by clicking each one and then click the ![←] button.

7. Scroll through the list of 'Available Display Columns' and select the following columns.
    a. Double-click **Site Number**
    b. Double-click **Area Number**
    c. Double-click **Total No of Contr Employees**
    d. Double-click **Total No of Federal Employees**
    e. Double-click **Total No of Other Personnel**
    f. Double-click **Total No of Occupants**

8. Use the Navigational Arrows on the "Selected Display Columns" to ensure they are order as listed below:

    a. Site Number
    b. Area Number
    c. Property ID
    d. Total No of Contr Employees
    e. Total No of Federal Employees
    f. Total No of Other Personnel
    g. Total No of Occupants

9. Click the **Run Report** button. Click **Save, Save As** and save the file to the Desktop. Change the file name to: **OccupantDataReview.xls**

10. Send the extracted data to the Subject Matter Expert (SME) to be updated with current data.

11. When the file is returned from the SME, open the file **OccupantDataReview.xls** in Excel.

12. Make sure the columns in the OccupantDataReview.xls file are in the same order as the columns in the Occupant_Upload.xls file. Remove the Property Name column.

13. Copy the data from the OccupantDataReview.xls file into the upload template file created in Exercise 19, Occupant_upload.xls. Only copy the rows of data, not the headings or the total row.

14. Save the file, **Occupant_upload.xls**.

_____

Exercise 21: Initiate the FIMS Upload

1. Click **Property,** then select **Upload** from the FIMS menu.

2. Click the ![+ Browse] button and locate the upload template. Click the **Occupant_upload.xls**. file and click **Open**.

3. Click the ![↑ Upload] button.

4. Verify your uploaded data.

Data Anomalies

Data accuracy in FIMS is critical. Prior to the year-end reporting, Headquarters goes through an extensive analysis of the database prior to the year-end snapshot. A significant part of this analysis is conducting a series of anomaly checks against the data and initiating a dialogue with Sites when questions arise.

Data Anomaly Checks

Provided in this section are data anomaly checks that each Site should perform on their own data prior to the end of the fiscal year.

Anomaly Check	Action Needed
1. **The Estimated Disposition Year cannot contain the value of the current or past fiscal year.**	Update the Estimated Disposition Year to reflect a future fiscal year.
2. **The Excess Indicator contains a value of 'Yes' and the Status is Operating.**	This may not necessarily indicate an error in the data however it does warrant a review to confirm the accuracy of the data. Typically, excess assets would not continue to show a Status of Operating. Update the Status as needed.
3. **The Excess Indicator contains a value of 'Yes' and the Mission Dependency is set to 'Mission Critical'.**	This may not necessarily indicate an error in the data however it does warrant a review to confirm the accuracy of the data. Typically, a Site would not be initiating the disposal of assets that are Mission Critical. Update the Mission Dependency as needed.
4. **Check for blank Inspection Dates or Inspection Dates are greater than 5 years old.**	Update Inspection Dates as needed to resolve blank dates. If Inspection Dates are greater than 5 years old, verify if a condition assessment has been done recently and FIMS was not updated to reflect the latest inspection. For OSF's, if PBPI is equal to 'Yes', it is acceptable to have blank Inspection Dates.
5. **The Excess Indicator contains a value of 'Yes' and the Utilization percentage is greater than 0%.**	This may not necessarily indicate an error in the data however it does warrant a review to confirm the accuracy of the data. Typically, a Site would not continue to utilize an asset that has been declared excess. Update the Utilization as needed.
6. **The Primary Quantity and/or Secondary Quantity (where**	Update the Primary and/or Secondary Quantity fields where this condition exists. These fields must be populated with values greater than zero.

Anomaly Check	Action Needed
applicable) contain a blank.	
7. **Numeric values such as Replacement Plant Value, Deferred Maintenance, and Actual Maintenance that contain low values below $100.**	Update the appropriate numeric field if needed if inaccuracies are discovered.
8. **Hours of Operations is greater than zero hours for assets in a shutdown status.**	This may not necessarily indicate an error in the data however it does warrant a review to confirm the accuracy of the data. Typically, a shutdown asset would not be in operation and therefore consuming utilities. Update the Hours of Operation as needed.
9. **GSA Owned and GSA Leased assets should be updated based on the latest GSA rent bills. Occupancy data for these assets should also be updated.**	Obtain the latest rent bill from the GSA Rent on the Web system and update the Annual Rent, Rentable Sqft and Usable Sqft as needed. Occupancy information should also be updated at this time.
10. **Dispositions designated as Federal Transfers that do not reflect a transfer to a Federal Agency such as Department of Defense, etc.**	Once assets are archived in FIMS, site personnel do not have authority to update archived information. Please contact the FIMS Hotline to initiate corrections to the Disposition Method.
11. **Annual Rent on a lease contains a value of $0.**	This may not necessarily indicate an error in the data however it does warrant a review to confirm the accuracy of the data. Typically, a lease would contain an Annual Rent greater than $0. Update the Annual Rent as needed.
12. **Expired leases exist in FIMS for DOE and Contractor leased assets.**	Update the lease Expiration Date as needed. If leases have expired or been terminated, they should be immediately archived with a disposition method of 'Early Termination/Cancellation' or 'Expiration/Cancellation'.
13. **The Total Cool Roof Projected Area contains a value that is equal to the Gross Square Feet of an assets where the Number of Floors is greater than one.**	Update the Number of Floors or Total Cool Roof Projected Area. It is acceptable that the Total Cool Roof Projected Area be the same as the Gross Square Feet provided the Number of Floors equals one.

Anomaly Check	Action Needed
14. **The Actual Maintenance or Deferred Maintenance of an asset is greater than the Replacement Plant Value.**	This may not necessarily indicate an error in the data however it does warrant a review to confirm the accuracy of the data. Typically, it is not expected that the Actual Maintenance or Deferred Maintenance would exceed the Replacement Plant Value. Update the Actual Maintenance, Deferred Maintenance or Replacement Plant Value as needed.
15. **The Actual Maintenance is $0 for operating assets.**	This may not necessarily indicate an error in the data however it does warrant a review to confirm the accuracy of the data. Typically, an operating asset would have some Actual Maintenance associated with it. Update the Actual Maintenance or verify the accuracy of the Status.
16. **The total site level Operating Cost is less than the asset level Operating Cost.**	Update the site level or asset level Operating Cost components as needed. The sum of the Operating Cost at the asset level cannot exceed the site level Operating Cost. The site level Operating Cost must be equal to or greater than the values input at the asset level.
17. **The Using Organization contains a value other than 8900 (DOE) when the Outgrant Indicator is set to 'No'.**	This may not necessarily indicate an error in the data however it does warrant a review to confirm the accuracy of the data. Typically, if the Using Organization is someone other than DOE, the Outgrant Indicator would be equal to 'Yes'. Update the Outgrant Indicator or Using Organization, as needed.